White Paper

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# Developing a Comprehensive and Sustainable Strategy for Protecting Historic New England's Collections


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## Safety and Security at Historic Properties

Historic house museums and sites represent a special challenge in the museum field. They are often in isolated locations, have minimal staffing, and operate with budgets that are constrained. The following recommendations for safety and security were produced based on an independent audit as well as the experiences of the staff at Historic New England, a heritage organization responsible for 37 historic sites in the northeastern section of the United States. The intent of these guidelines is to identify the standards for Historic New England to follow as well as provide helpful information for other stewards of historic museums and sites. It should be noted that many of the recommendations might cost little to nothing while the cost for others could be significant. Each organization should weigh how each recommendation may affect security at the site and how operational and budgetary issues will guide the decision of whether to adopt certain security protocols.

## Basic Guidelines for Historic House Museum Security

- Someone needs to be in charge of security
- Understand what you are trying to protect
- Determine your standard for security
- Develop your security policies and procedures
- Develop and maintain a relationship with your security vendors
- Tightly control keys and alarm access
- Take steps to ensure visitor and staff safety

These concepts are explored in greater detail on the following pages.

*This white paper is based on a safety and security audit produced in 2017 by Practical Management Resources for Historic New England as part of a project supported by the National Endowment for the Humanities. Any views, findings, conclusions, or recommendations expressed in this white paper do not necessarily represent those of the National Endowment for the Humanities (www.neh.gov), and are offered as a guideline. Please consult with your own security provider or consultant after reading this document to determine how to improve security at your historic site.*

## Someone Needs to be in Charge of Security

At Historic New England, security awareness is something we expect all staff to possess–guides and other site staff, collections staff, and property care staff. Unfortunately, the belief that security is everybody's business can lead very quickly to becoming nobody's business. Historic New England's experience has shown that even assigning the task of security to one team can be problematic; ideally, it should only belong to one person. Unless there is a single point of responsibility with the accompanying authority to implement it (under appropriate budgetary guidelines), the job will never be comprehensive or complete.

Most small and medium-sized organizations simply cannot afford to hire a staff person whose only role is security. Therefore, it is critical to designate a staff person whose job it is to be in charge of security decisions. To be most effective, this person should have security as part of their position responsibilities and not just a designation on top of an existing role. If appropriate time is not allocated to the task, then it will continue to be less of a priority.

The typical role of the security liaison includes but is not limited to:

- Scheduling, administering, and monitoring of all fire and security alarm service contracts
- Management of the keys and locks for the facilities
- Approving security access for staff and volunteers
- Establishment and maintenance of the list of staff and volunteers who are entitled access and what levels of access or keys they may have
- Coordination of annual training of all staff in safety and security protocols
- Designating alarm responders and protocols, then following up after incidents to determine cause and ways to mitigate incidents in the future

## Understand What You are Trying to Protect

It is important to have an understanding of what you are trying to protect and why you want to protect the item. The way you approach security should be tailored to your collections, your staff, how objects are displayed, your tolerance for risk, and the financial capability of your institution to support the decisions being made. At Historic New England, this conversation involves the site staff, collections staff, and property care staff. At a house museum, it is generally not necessary to alarm every painting on the wall, for instance, because the room itself might be protected with motion detectors. However, perhaps there is a single object of high monetary, spiritual or cultural value and so it might be appropriate to consider a contact sensor for this object. If a guided tour enters a room, perhaps small items need to be anchored in some discreet way to prevent them from being quickly pocketed. Or if entry to a room is blocked by a barrier, perhaps the alarm is never disengaged for that room or there are proximity alarms to alert site staff of an unauthorized entry. Perhaps the tour program is unguided and so you need to look at how visitors will interact with the objects in that context and what type of security is appropriate.

There is generally not enough money in anyone's budget, nor is it generally necessary, to alarm every single object. Review where you may be at risk and develop a plan. Your existing security company will generally review your security program and areas of potential risk with you so that you can make informed decisions.

## Determine Your Standard for Security

It is always beneficial to establish the ideal security standard to which you are striving. Even if you have that standard, it does not mean every situation will require application of the entire standard. For example, if you have multiple sites, the full standard may be appropriate for a larger site with collections but a smaller site with no collections may only require components of the standard. Even if you have multiple sites with collections, such as Historic New England, it might be impossible or imprudent to apply a "one size fits all" security solution. Each organization needs to weigh the level of risk it is willing to assume at each of its sites.

Some of the key points to consider in establishing your standard for security include:

- Background checks: Make sure staff, tenants, volunteers, and anyone else who may be given access to collections have had a background check completed as part of their onboarding.
- Key and lock systems are one of the primary means of securing a space and yet this is where the greatest challenge can lie because keys get shared, duplicated, not returned or even lost. A proprietary key system is much better than a common key system as it greatly restricts the number of keys that can be duplicated. However, if a key is stolen or lost, the cost is tremendous to change the affected locksets and replace the keys. Additionally, there is a finite space within a proprietary system and, if you have a multitude of sites with many different levels of security, one can quickly strain against the limits of the system.
    - For regional organizations, a single proprietary system can be challenging because you are reliant on one locksmith company for service. A regional series of keyed zones with regional locksmiths may be the most efficient manner to approach the situation.
    - Additionally, wherever there is a high level of access required, you should consider a simple lockset with the implicit understanding that the locks are changed annually.
    - If there is a tenant apartment at the historic site, consider using a simple lockset. Although these keys can be duplicated by anyone, the locks are easier and less expensive to change if the apartment keys are lost or stolen, or there is an apartment turnover.
- Having modern alarm control/communication panels that are upgraded at least every 5-10 years. Consideration should be given to sensor replacements at this time as well, especially if false alarm problems have developed because of equipment issues.
- Alarm control panels should be able to accommodate each user having their own access code. Shared codes are not standard industry practice and should be eliminated. Many residential panels can only accommodate seven or so codes, so if you have more people needing access then you should inquire about a panel with more capacity.
- Collect regular opening and closing reports from the alarm vendors. With many sites having multiple uses and multiple users, it is important to be aware of how the building is

being used and if it is being secured and unsecured properly. Alarm companies can provide periodic reports of opening and closing activity when asked. The reports will show who armed or disarmed a building, and when. These reports can be weekly, monthly, quarterly, etc. based on the needs of the organization.

- There is no written security standard concerning the placement of security devices. The level of security is mostly a matter of the organization's level of risk aversion. Historic New England feels, at a minimum, that security alarm systems should include door contact sensors at the exterior doors and motion detectors providing coverage throughout the basement, first floor, and second floor. Because of the nature of historic house museums and the difficulty of running cable through historic architecture, wireless components are sometimes desirable.
- Systems should have primary and backup communication systems. Historically, systems communicated via copper telephone lines. Maintenance of the copper infrastructure is quickly being phased out by the telecommunication companies and so many systems now communicate over data lines like cable and FiOS. Cellular is a common technology for communication and is often used as the backup.
- A separate fire detection system with an addressable alarm panel should be included in larger sites that contain collections. Smaller sites and sites with no collections will usually be allowed to utilize a standard combination security and fire control panel. The local authority that has building code jurisdiction will have the final say in this matter.
- Outbuildings, such as barns, should be protected with a basic fire alarm system. These systems would usually consist of heat detectors as most are unheated spaces.
- Security and fire alarm systems should be equipped with at least a 24-hour battery backup system. If the power outage exceeds 24 hours and there is no way to charge the batteries running the security system, the alarm will no longer be operable. If the site no longer has its security system, a strategy should be in place based on the site and collections as to what level of auxiliary security should be deployed. For instance, if the security system is no longer operable, perhaps staff could be present during the day and a security detail could be hired to watch the site overnight.
- Email alerts can be generated by most security companies for alarms that have been triggered. These alerts are valuable backup documentation of alarm or security issues at the sites. The person responding to an alarm call may not always remember to report it but with the email as a backup, staff can follow up and be sure they understand the cause.
- Annual inspections by the fire department or other fire official should be scheduled. This allows the fire department to not only view and approve fire detection devices, but also to become familiar with the site and its contents.
- Sites should work with local fire departments to determine the possibility of obtaining a key repository box system, such as a Knox Box. The concept is that a key for your site is available for the fire officials to use to enter the site even if a staff member is not there. If you do not have a key repository, one risks the fire department forcing their entrance through a window or a door and damaging the historic fabric.
- The minimum coverage for site lighting should include the main access points to the historic house museum, parking lot, and walkways and paths from the parking lot to the

museum. House entrances should be well illuminated to allow visibility from the street where possible.

- Video surveillance, if you choose to have it, should be located at least at the building entrances of larger sites with collections. As these systems are expanded they should then include driveways and parking areas, and finally interior spaces where collections are located. Your goal is to capture the face of every person entering a site and, if possible, the license plate of every vehicle.
    - Video surveillance can be a valuable tool when deployed correctly. It is most beneficial when the user understands the capabilities and limitations of such a technology. A historic house museum does not typically have the staffing necessary to monitor live security feeds. The greatest value of video surveillance is accordingly forensic in nature. What happened? When did it happen? Who was involved? Cameras can now be set up through a network and be available through online portals so there is more capability of setting up basic monitoring on a staff level. It is recommended that cameras be placed strategically at historic houses, specifically at exterior entrances to monitor activity. This is especially important when tenants live the house and use a common entrance door.
    - It should be noted that cameras present aesthetic and preservation issues for a historic house museum. The organization needs to understand what the appearance of the camera will be. For instance, if the recommendation is for the camera to be located at the exterior entrance and that is the front door, the camera will be on the front façade of your house museum.
    - Historic New England has experimented with wireless cameras. It has found that the quality of the footage suffers if you do not have a sufficiently powerful wi-fi system and that the video camera constantly streams data over the wi-fi, cutting into the potential of other devices on site to use the same wi-fi. Hard wiring is the most effective and fool-proof way to install cameras, however that leads to preservation issues related to the required penetrations for the wiring.

## Develop Your Security Policies and Procedures

You will want to have written policies and procedures so that the expectations for staff and volunteers are clear from the start.

- Key distribution and collection: All keys issued by the organization should be logged to individuals and collected upon their departure. Control the keys and try to limit how many are in circulation.
- Granting and terminating alarm access: Every individual granted access to the museum should have an individual alarm code so that entries and exits can potentially be tracked. Not everyone needs access to the museum – restrict where you can!
- Alarm reporting: Every alarm that is triggered should be reported by the responder. This information, including time of the event, probably cause of the event, and activities that resulted from the event, should be tracked so that any trends can be noted. The most common trends relate to equipment failure (the same sensor is tripping), animal intrusion (it’s not an equipment failure; a bat is flying around the room!), and user error (the same staff members set off the alarm each time they enter). A single incident of user error or a

false alarm may not be cause for follow up, but after multiple incidents it would be time for action.

- Staff safety program: Develop a program where staff are not alone at the site or, if that is unavoidable, a system is in place for staff to check on each other or alert others if there is a personal safety issue.
- Structured tenant agreements: Many historic houses have tenants who live either in the house or in an adjacent building. Tenants in adjacent houses pose typical tenant problems, but having tenants living in the historic house itself is a special challenge and must be tightly controlled. It is fully understood that many other factors play into this decision, but just speaking of safety and security, when there is a tenant in the house there is always a compromise in security protocols. You can screen a tenant, but you cannot screen their family and friends who might visit. Additionally, tenants will have their own schedule and so lights may be on or off, for example. Without consistency, there is no way for a neighbor or concerned citizen to determine if something may be amiss at the house. If, however, it is determined that tenants are a necessity, then an orientation must be standardized and presented to the potential tenants and a tight contract should be written that dictates when they may enter the house museum and when they cannot. The tenants must be aware of the nature of the house and the collections and have a security and safety awareness. Also, their individual responsibilities and parameters of the use of space must be outlined (inspections, storage, parking, etc.). Sub-letting, for either short term (like Airbnb) or longer term, is a security risk for the site because persons are being allowed access without background checks.
- Emergency preparedness plans: These should detail how staff should react to a wide range of issues including weather-related problems as well as security issues.
- Site-specific opening and closing policies: Each Historic New England site is different, yet each share common security requirements. Develop policies and procedures that address the opening and closing of each site, the disarming and arming of each alarm, procedures during tours, collection inspection, etc. Procedures also should be standardized concerning alarm response. Most of these procedures will be the same at every site, except for individual keys necessary at certain sites. This standardization of policies and procedures will be helpful in the training of all staff across the institution.
- Initial training and annual refresher training: Security and life safety awareness training should be made available to all staff. At Historic New England, this would be most effective each year in the spring prior to June 1, when most of the sites open. This training should include security awareness, alarm response procedures, life safety responsibilities, and fire extinguisher training. The training should take no more than a half day and be as interactive as possible. Alarms should be sounded to acquaint the staff with the noise that occurs when an alarm is tripped.

## Develop and Maintain Relationships with Your Security Vendors

The success of any vendor program is predicated on the fact that the program is monitored by the customer and not solely by the vendor. One should always explore your options by interviewing alarm companies and determining if they can provide the services that are important to you. If your organization owns a large number of properties, offering multiple monitored accounts instead of one may bring a better monthly monitoring fee. It is also generally a best practice to have annual maintenance contracts.

Some standard items to consider when setting up a contract:

- Annual point-by-point fire alarm detector testing and reporting verification
- Annual fire alarm system cleaning
- Annual fire alarm communications test (primary and backup)
- Annual burglary alarm point-by-point testing and reporting verification
- Annual burglary alarm system cleaning
- Annual battery inspection and necessary replacement for both fire and burglary alarms
- Annual battery testing and replacement for panic/duress and other wireless devices
- Annual burglary alarm communications test (primary and backup)
- Written report of inspection and verification of all points, all systems
- Open/close reports as deemed necessary, (weekly/monthly) as well as email alerts when buildings are armed and disarmed
- Timely addition and deletion of system users and codes upon the request of the owner
- Guaranteed response time to alarm outages and emergencies (negotiable)
- Emergency response rates and fees (included or not included)
- Penalties of non-compliance with contract (termination of contract)
- Contract payment terms (usually paid in advance or paid 6 months in advance)

## Tightly Control Keys and Alarm Access

Controlling key and alarm access is one of the best ways to ensure that your site is secure. However, the larger your site is or the more complicated its operation and programming are, the harder key control becomes. Additionally, the more sites you have, the more keys and key managers you might end up with. Historic New England has found that there is no single solution to this problem.

The focus needs to be on the control of the keys and access, rather than the configuration. It is always recommended to start with an evaluation of the keys that are necessary for access and how these keys need to be distributed. This means not just doing things the same way but determining what the best practice would be if you were beginning fresh. The ideal is that few or no keys leave the premises. Once a key leaves the property, the risk of loss or theft increases. Typical key and lock sets are relatively inexpensive to maintain; the downside, however, is that anyone can make copies of the keys. The keys of a proprietary system are harder to duplicate but the systems are more expensive to maintain.

A site evaluation should include a complete key inventory. Which keys do you have for the site, which keys do you still need, and are there any extra or unknown keys? The site evaluation needs to also ask who needs access versus whether it would be nice or convenient for a person to have access. The key inventory should be maintained and only certain staff should be assigned key collection and distribution roles. They should maintain their own records and submit an audit of keys annually. Staff who have responsibilities to assign keys should have a lock box so that no one can mistakenly access and walk away with a key.

One possible method of key control is to leave the exterior door key to a site in a lock box, attached just outside the staff access to the house. This is a small combination lock with room for one or two keys; it they can be attached to the building or simply hung around a doorknob. The combinations on these locks can be changed easily and they are a very secure solution. Realtors and contractors routinely use them. Historic New England has successfully tested this model at several locations and has been able to limit the number of keys that are issued to guides, for example, at these sites.

## Take Steps to Ensure Staff and Visitor Safety

Staff who work in and around historic house museums can sometimes find themselves alone. For example, guides who are in a historic house alone and are beginning to take a group of visitors on a tour will lock the door to keep the house secure. Depending on the type of door, locking it may cause difficulty for staff and visitors to leave in an emergency. There are some recommended ways to deal with this situation. First, identify where your emergency exits should be located. Not all exits should be designated emergency exits. At large sites, emergency exits are usually at either end of the building and perhaps also an additional one in the middle. Emergency exits should be signed and the door hardware should be reviewed and simplified for ease of operation by both trained staff and visitors in an emergency. Train staff on where the emergency exits are located and have them incorporate this information into the beginning of each tour.

Lighting can be one of the most important aspects of any security program. The assumption that lighting reduces crime, however, can be misleading. Not all crime happens at night, or in dark places, so the inclusion of lighting in itself will not prevent all crimes. Lighting is extremely valuable in reducing the fear of crime and deterring criminal behavior. As a deterrent, lighting can increase the likelihood of criminals being noticed or identified. Increasing the risk for criminal behavior often results in criminal behavior moving to less risky locations. At historic sites, there is often a lack of consistent exterior lighting for entryways, parking, and the paths to parking. The purpose for the light should be evaluated because the goals for staff, tenants, and visitors may be different. Is the light for security purposes or really for the general safety of visitors as they navigate on foot at night? The lighting requirements for a surveillance system, for example, might focus on lights that illuminate faces to ensure that the cameras are capturing the needed information but these would not necessarily illuminate the path as gracefully as you might want. Down lights are good for safety, lighting paths for instance, but they shroud areas in darkness and thus are not necessarily good for security. The goals of the lighting should be evaluated on a site-by-site basis. Regardless of the lighting intent, exterior lights should be placed on timers so that they can be on a consistent schedule even when staff are not present.

At historic sites, the conversation of lighting can sometimes be lengthy and costly. There are the costs of design, archaeology (if digging is required), and installation. If this is a road block, consider deploying battery-operated lights as a test. There are models that are motion-activated and include wireless connections to other lights, so if one is triggered others in the series will also turn on. This can quickly add safety lighting for staff and visitors that may also provide a level of deterrence as an added benefit.